

Advanced Clinical Reporting Workshop

User's Conference 2024

Here are some of the things you'll do during this practice session:

- Connect to the EHR Report Library on your own server
- Experience how to customize EHR clinical reports to meet your needs

Connect to the EHR Report Library on your PCC server for these exercises. Please see a PCC staff member if you need assistance with connecting to your server.

Exercise 1: Create a recall list identifying 11-12 year olds in need of HPV vaccine dose(s).

- Use the "Immunization -> Overdue Vaccine Recall" report

Exercise 2: Create a recall list in the EHR Report Library identifying patients 12-18 years old who are overdue for a well visit or due within the next 90 days.

- Be sure to exclude patients who:
 - Have a flag that would indicate the patient is inactive
 - Already have a well visit scheduled in the next year
- Save this as a customized report for future use. Remove criteria you don't need to filter on. Add or remove desired column output.

Exercise 3: Identify all referral orders that are not yet completed and need follow-up.

- Use the "Orders by Visit" report in the "Clinical" menu.
- Save this as a customized report for future use.
- (If desired) Schedule this report to run on the first of every month.

Exercise 4: Identify a list of patients with a non-well visit appointment scheduled for tomorrow, who are due for a well visit. These are visits that you may want to consider "upsizing" to be a well visit.

- Use the "Patient List" data source
- Restrict to patients with "Physical Due Date" being "All Past Dates through next 30 days"
- Restrict to appointments scheduled for tomorrow, with a non-well visit appointment type.